

Abstract

A methodology and automated system are provided whereby a merchant presents timely and relevant information to customers. The system includes a client-side local assistant system and a server-side component. The client-side  
5 local assistant system, which is download installed on a customer's computer, implements an automated client-side system that is fully data driven. The data is partly downloaded data, called rulesets, and partly data that is collected and stored locally, called interaction data. The client-side system includes functionality for specifying and interpreting rulesets for observing, analyzing  
10 and storing information about, and relating to, computer-mediated customer interactions, such as viewing web pages or playing music. The client-side system also includes functionality for defining periodic tasks, such as gathering, analyzing and displaying information on topics of interest, and for direct interaction between the client-side system and the customer. The server-side  
15 component stores and provides access, upon request, to a downloadable version of a client side core local assistant system. The server-side component also stores and provides access, upon request, to downloadable rulesets maintained by an agent. It also provides functionality for maintaining download statistics and for controlling the number of downloads of given ruleset. The server-side  
20 component also provides functionality for collecting data generated by ruleset application for storage in a server-side interaction database. The schema of this database are constrained to maintain customer privacy. The server-side component also provides functionality for reporting information to assisted merchants; the reporting functionality includes at least the ability to report  
25 information by merchant, by ruleset, and over a specified period of time.